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Germany

Citrus

Trade Report

2002

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Report Highlights:

During the first eleven months of MY 2001/2002 (Oct/Aug) total German imports of fresh citrus fruit amounted to 985,535 MT, of which 1.8 percent or 17,894 MT originated from the United States. Grapefruit accounted for almost all of the U.S. citrus exports to Germany. Spain supplied 75 percent of all citrus imported into Germany. For MY 2002/2003 German citrus imports are expected to increase.

Includes PSD changes: No
Includes Trade Matrix: Yes
Trade Report
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Executive Summary

Note : The local marketing year is October through September, however, as data for September 2002 is not yet available, for comparisons only the months of October through August are used in the trade matrices.

Germany does not produce fresh citrus fruit therefore consumption is met solely by imports. Over 90 percent of the imports originate from Mediterranean countries, with Spain being the largest supplier. Only grapefruit and lemons originate in substantial amounts from countries outside the Mediterranean Sea area. In MY 2001/02 (Oct/Aug) 55 percent of the imported grapefruit originated from non-Mediterranean countries, mainly the United States, Argentina and South Africa, with an import share of 30 percent, 8 percent, and 7 percent, respectively. Argentina supplied 29 percent of the imported lemons. Spain was the largest supplier of fresh citrus fruit to Germany with a total market share of 75 percent, a market share of 87 percent in fresh crossbreeds (e.g. tangerines and mandarins), and a market share of 77 percent and 74 percent in fresh oranges and fresh lemons, respectively, in MY 2001/2002 (October/August). Brazil was the largest supplier of orange juice to Germany with a market share of 59 percent in MY 2001/2002 (Oct/Aug).

In general, U.S. exports of fresh citrus to Germany are marginal. For the first 11 months of MY 2001/2002 (Oct/Aug) total citrus exports to Germany amounted to 17,894 MT, which represented merely 2 percent of total German citrus imports. However, the United States was the most important supplier of grapefruit in the German market with a 30 percent market share of imports by volume.

Typically Germany re-exports only limited quantities of fresh citrus fruits. This trend also showed in the first eleven months of MY 2001/2002 when 26,150 MT were exported. However, about one third of the imported orange juice concentrate is processed into juice, and then re-exported mainly to other EU countries, especially France, the Netherlands, Great Britain, Belgium and Spain.

Data for MY 2001/2002 is still preliminary. However, the 7 percent decline in total citrus imports is attributed to lower consumption in Germany in Fall 2001 mainly because of mild weather conditions, combined with frost in Greece and Turkey, which resulted in decreased exports in early 2002.

Forecast: For MY 2002/2003, German citrus imports are expected to increase compared to MY 2001/2002 in response to better quality of the citrus fruit crop in the Mediterranean countries, which is expected to result in 4 percent increase in exports during the winter of 2002/2003.

General

MY 2001/2002

Demand and consumption of all fresh citrus fruit in Germany mainly depends on the size of the citrus crop and the export availability in Mediterranean countries. Total imports of all types of citrus amounted to 985,535 MT in the first eleven months of MY 2001/2002 (October/August), about 7 percent less than during the same period in the previous year. This decrease was unexpected and can be attributed to two factors. First, the weather in Germany in the fall of 2001 was unusually mild, which negatively affected citrus consumption as many Germans consume citrus because of its vitamin C content in order to combat or prevent colds. Second, at the beginning of 2002 unusually cold weather in Greece and Turkey led to a temporary reduction in supply, resulting in lower export sales to Germany and in higher citrus prices.

German imports of fresh oranges (excluding bitter oranges) in MY 2001/2002 (October/August) totaled 492,529 MT, down 4 percent from the same period in the previous marketing year. During this period 77 percent of the imported oranges originated from Spain. Other important suppliers of fresh oranges were Italy, Greece, Morocco and South Africa. U.S. shipments of oranges were negligible at only 49 MT. Oranges accounted for 50 percent of Germany's total citrus imports during this period.

Imports of fresh crossbreeds (tangerine-type citrus) during the first 11 months in MY 2001/2002 amounted to 307,722 MT, down 9 percent from the previous year. Spain clearly dominates the German market with an import share of 87 percent, followed by Turkey (3.2 percent), Italy (3.1 percent) and Morocco (2.2 percent). Crossbreeds accounted for 31 percent of total German citrus imports.

Imports of fresh lemons dropped by 4 percent to 1118,437 MT in MY 2001/2002 (October/August) compared to the same period in MY 2000/2001. Spain, Argentina, Italy, and Turkey were the main suppliers of fresh lemons to Germany, with Spain and Argentina supplying 74 percent, and 16 percent, respectively, in MY 2001/2002 (October/August). Lemons comprised 12 percent of total German citrus imports.

In Germany, grapefruit is not as popular as the other citrus fruits. In MY 2001/2002 (October/August) only 6 percent of the citrus imports were grapefruits. Imports of grapefruit in MY 2001/2002 (Oct/Aug) amounted to 58,861 MT, about 20 percent less than during the same period in the previous marketing year. Israel, traditionally the second largest supplier of grapefruit to the German market, shipped about 10,000 MT less than the year before. This decline is primarily attributed to the unstable political situation in Israel, which resulted in a lack of seasonal workers for the harvest.

In MY 2001/2002 (October/August) the United States was the largest grapefruit exporter to Germany with an import market share of about 30 percent (17,829 MT), followed by Turkey (12,650 MT or a 22 percent market share), Israel (15,501 MT or a 9 percent market share), Argentina (4,639 MT or a 8 percent market share), and South Africa (4,234 MT or a 7 percent market share). Most U.S. grapefruit exports consist of the "ruby red" variety from Florida.

Imports of orange juice (figures converted to 65 degrees Brix) totaled 261,847 MT in MY 2001/2002 (October/August). This is a decrease of 9 percent compared to the previous marketing year (October/August), with Brazil supplying approximately 59 percent or 142,318 MT of the market followed by Switzerland with 46,671 MT and the Netherlands with 14,012 MT. The United States is a marginal supplier of orange juice, accounting for only 1,607 MT or about 1 percent of the import volume in Germany. Orange juice is the second most popular juice (behind apple juice) in Germany and accounts for 24 percent of the domestic juice consumption.

Note: All trade data for orange juice has been converted to 65 degrees Brix. Imports of orange juice cover all categories of orange juice with varying concentrations depending on the country of origin. Therefore all imports were first converted to a single-strength equivalent (i.e. 11.2 degrees Brix or 45 oechsle), which differs slightly from the 11.8 degrees Brix considered in the U.S. as single strength). Various conversion factors for the individual categories of juices were used. This is necessary as German and EU import statistics only distinguish citrus juices below and above 67 Brix. Furthermore, because of considerable differences in the concentration of products imported versus products exported, but shown under the same product category, different conversion factors were applied for imported and exported products. The calculated single-strength equivalent citrus juice trade data were converted into 65 degrees Brix equivalent by dividing them by a factor of 5.8.

All exports of fresh citrus from Germany are re-exports. Exports amounted to 3 percent of total citrus imports and totaled 29,702 MT in MY 2001/2002 (October/August), 13 percent less than in the previous MY (October/August), in line with reduced imports.

With orange juice, the situation is different. Substantial amounts of imported concentrated juice

are processed into juice and exported thereafter mainly to other EU countries, especially France, Spain, the Netherlands, Belgium and Great Britain. In MY 2001/2002 (October/August) Germany exported 86,483 MT of orange juice (65 degrees Brix equivalent). That is about 33 percent of the import volume.

MY 2002/2003

Mediterranean producers expect citrus exports in MY 2002/2003 to rise by 3.8 percent, from 5.526 million MT to 5.740 million MT (all data referring to October/September). Exports of oranges are expected to rise by 5 percent to 2.8 million MT. For crossbreeds the increase in exports is projected at 7 percent to 1.9 million MT, and for grapefruits at 5 percent to 246,000 MT. Only lemon exports are expected to face a decrease of 7 percent to 755,000 MT, as Turkey is expecting a smaller harvest compared to last season's record lemon crop.

German domestic consumption is usually positively correlated with Mediterranean citrus exports, therefore German imports are also expected to rise.

The biggest disadvantage for U.S. citrus fruit on the German market used to be the unfavorable exchange rate, which made U.S. products very expensive compared to products from other origins. The weakening U.S. dollar could help increase prospects for U.S. citrus on the German market.

Note : In recent years the U.S. dollar/German mark exchange rate has been as follows:

1991: US\$1 = DM 1.66;	1996: US\$1 = DM 1.50;	2001: US\$1 = DM 2.18
1992: US\$1 = DM 1.52;	1997: US\$1 = DM 1.70;	
1993: US\$1 = DM 1.65;	1998: US\$1 = DM 1.76,	
1994: US\$1 = DM 1.61;	1999: US\$1 = DM 1.66,	
1995: US\$1 = DM 1.43;	2000: US\$1 = DM 2.12.	

Further exchange rates are for:

Euro/€German mark: Euro 1 = DM 1.95583,
 U.S. dollar/ € US\$1 = Euro 0.9966
 €U.S. dollar €1 = U.S. dollar 1.003
 (as of November 21, 2002, Handelsblatt)

Table 1: German Imports and Exports of Fresh Oranges

German Imports of Fresh Oranges, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of imports (percent) in MY 2001/2002
USA	17	USA	17	46	0.009
Spain	369,416	Spain	368,695	379,110	77.0
Italy	40,638	Italy	40,538	35,009	7.1
South Africa	26,842	Greece	29,622	23,437	4.8
Morocco	18,507	Morocco	18,487	17,126	3.5
Greece	29,622	South Africa	21,352	12,331	2.5
Zimbabwe	10,159	Argentina	6,693	8,595	1.7
Argentina	7,955	Zimbabwe	9,884	6,312	1.3
Turkey	5,602	Turkey	5,602	4,753	1.0
France	4,401	Egypt	0	2,401	0.5
Israel	3,940	Brazil	0	1,152	0.2
Other	5,559	Other	13,182	2,257	0.5
TOTAL	522,620	TOTAL	514,072	492,529	100.0
German Exports of Fresh Oranges, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of exports (percent) in MY 2001/2002
USA	0	USA	0	0	0.0
Netherlands	3,579	Austria	2,738	2,783	23.1
Austria	2,821	Poland	1,405	1,912	15.8
Poland	1,465	France	1,220	1,626	13.5
France	1,282	Netherlands	3,312	1,054	8.7
Denmark	1,258	Finland	497	497	4.1
Italy	838	Denmark	1,079	733	6.1
Spain	688	Italy	755	635	5.3
Sweden	609	Belgium		587	4.9
Finland	504	Sweden	546	324	2.7
Great Britain	285	Great Britain	204	304	2.5
Other	692	Other	1,334	1,338	11.1
TOTAL	14,021	TOTAL	13,090	12,065	100.0
* Period Oct/ Aug sorted by order of importance in MY 2001/2002					
Source: Data from the German Federal Office of Statistics, Wiesbaden					

Table 2: German Imports and Exports of Crossbreeds

German Imports of Fresh Crossbreeds, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of imports (percent) in MY 2001/2002
USA	35	USA	35	17	0.0
Spain	299,404	Spain	298,351	268,824	87.4
Italy	9,388	Turkey	8,486	9,952	3.2
Turkey	8,488	Italy	9,387	9,601	3.1
Morocco	7,262	Morocco	7,262	6,796	2.2
Greece	5,036	Greece	5,036	4,989	1.6
Cyprus	3,132	Cyprus	3,132	3,792	1.2
Israel	1,921	Argentina	1,317	1,683	0.5
Argentina	1,690	France	763	750	0.2
South Africa	1,220	South Africa	1,178	407	0.1
France	763	Uruguay		269	0.1
Other	908	Other	2,749	642	0.2
TOTAL	339,244	TOTAL	337,696	307,722	100.0
German Exports of Fresh Crossbreeds, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of exports (percent) in MY 2001/2002
USA	0	USA	0	0	0.0
Austria	1,577	Austria	1,567	1,647	24.0
Poland	1,439	Finland	400	1,465	21.3
Sweden	928	Poland	1,434	1,381	20.1
Netherlands	859	France	701	602	8.8
France	701	Sweden	907	457	6.6
Italy	551	Netherlands	803	387	5.6
Denmark	484	Denmark	484	291	4.2
Finland	400	Italy	551	156	2.3
Lithuania	311	Lithuania	311	120	1.7
Latvia	228	Russia		82	1.2
Other	497	Other	710	287	4.2
TOTAL	7,975	TOTAL	7,868	6,875	100.0
* Period Oct/ Aug sorted by order of importance in MY 2001/2002					
Source: FAS Berlin based data from the German Federal Office of Statistics, Wiesbaden					

Table 3: German Imports and Exports of Lemons

German Imports of Fresh Lemons, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of imports (percent) in MY 2001/2002
USA	1	USA	1	1	0.0
Spain	96,904	Spain	92,882	14,798	50.8
Argentina	19,593	Argentina	13,551	8,298	28.5
Italy	8,013	Turkey	1,802	2,729	9.4
Greece	3,390	Greece	3,362	966	3.3
Cyprus	2,451	Cyprus	2,451	882	3.0
Turkey	2,148	Italy	7,491	759	2.6
South Africa	2,147	South Africa	1,529	446	1.5
Uruguay	188	Uruguay	141	168	0.6
Netherlands	129	Netherlands	129	26	0.1
France	61	France	61	25	0.1
Other	159	Other	136	45	0.2
TOTAL	135,184	TOTAL	123,536	29,143	100.0
German Exports of Fresh Lemons, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of exports (percent) in MY 2001/2002
USA	0	USA	0	0	0.0
Finland	1,481	Finland	1,481	1,308	27.5
Austria	1,279	France	362	784	16.5
Poland	760	Netherlands	267	661	13.9
Netherlands	759	Denmark	381	480	10.1
Denmark	394	Austria	1,182	389	8.2
France	378	Russia	345	232	4.9
Russia	345	Spain	321	215	4.5
Italy	338	Italy	192	201	4.2
Spain	321	Sweden		170	3.6
Czech Republic	210	Poland	760	146	3.1
Other	573	Other	669	170	3.6
TOTAL	6,838	TOTAL	5,960	4,756	100.0
*Period Oct/ Aug sorted by order of importance in MY 2001/2002					
Source: Data from the German Federal Office of Statistics, Wiesbaden					

Table 4: German Imports and Exports of Grapefruit

German Imports of Fresh Grapefruit, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of imports (percent) in MY 2001/2002
U.S.	20,506	USA	20,344	17,829	30.3
Israel	15,729	Turkey	11,627	12,650	21.5
Turkey	11,629	Spain	5,620	6,299	10.7
South Africa	8,512	Israel	15,722	5,501	9.3
Spain	5,639	Argentina	3,252	4,639	7.9
Argentina	3,806	South Africa	7,888	4,234	7.2
Honduras	2,887	Honduras	2,590	1,920	3.3
Zimbabwe	1,883	Zimbabwe	1,859	1,859	3.2
Cuba	1,838	Cuba	1,838	1,610	2.7
Cyprus	1,189	Brazil		677	1.2
Swaziland	627	Mexico		573	1.0
Other	1,230	Other	2,912	1,161	2.0
TOTAL	75,470	TOTAL	73,652	58,861	100.0
German Exports of Fresh Grapefruit, in MT					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of exports (percent) in MY 2001/2002
USA	0	USA	0	0	0.0
Netherlands	3,058	Poland	1,995	2,981	47.7
Poland	2,047	Netherlands	2951	954	15.3
France	988	Italy	850	831	13.3
Italy	883	France	693	500	8.0
Denmark	539	Denmark	506	253	4.0
Austria	392	Austria	384	232	3.7
Spain	163	Greece	59	146	2.3
Great Britain	121	Sweden	70	102	1.6
Sweden	110	Spain	163	69	1.1
Greece	59	Belgium		40	0.6
Other	142	Other	226	144	2.3
TOTAL	8,502	TOTAL	7,897	6,251	100.0
*Period Oct/ Aug sorted by order of importance in MY 2001/2002					
Source: Data from the German Federal Office of Statistics, Wiesbaden					

Table 5: German Imports and Export of Orange Juice at 65 Brix

German Imports of Orange Juice, in MT at single strength					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of imports (percent) in MY 2001/2002
USA	16,374	USA	15,147	9,320	0.6
Brazil	1,087,757	Brazil	976,737	825,447	54.4
Switzerland	266,953	Switzerland	244,971	270,691	17.8
Netherlands	109,574	Belgium	43,892	81,268	5.4
Belgium	83,649	Netherlands	86,625	58,585	3.9
Spain	64,886	Poland	59,978	47,506	3.1
Poland	63,787	Italy	48,805	50,775	3.3
Italy	58,016	Spain	60,150	42,340	2.8
Cuba	37,903	Czech Republic	16,324	32,065	2.1
Austria	22,875	Cuba	33,283	22,516	1.5
Czech Republic	18,071	Costa Rica	14,989	17,940	1.2
Other	79,485	Other	64,722	60,258	4.0
TOTAL	1,909,332	TOTAL	1,665,623	1,518,712	100.0
German Exports of Orange Juice, in MT at 65 Brix					
MY 2000/2001 (Oct/Sept)			MY 2000/2001* (Oct/ Aug)	MY 2001/2002* (Oct/ Aug)	share of exports (percent) in MY 2001/2002
USA	2,823	USA	2,612	1,607	0.6
France	187,544	France	168,403	142,318	54.4
Spain	46,026	Netherlands	42,236	46,671	17.8
Netherlands	18,892	Great Britain	7,568	14,012	5.4
Belgium	14,422	Belgium	14,935	10,101	3.9
Great Britain	11,187	Spain	10,341	8,191	3.1
Denmark	10,998	Denmark	8,415	8,754	3.3
Portugal	10,003	Portugal	10,371	7,300	2.8
Italy	6,535	Italy	2,814	5,528	2.1
Greece	3,944	Greece	5,738	3,882	1.5
Sweden	3,116	Sweden	2,584	3,093	1.2
Other	13,704	Other	11,159	10,389	4.0
TOTAL	329,195	TOTAL	287,176	261,847	100.0
*Period Oct/ Aug sorted by order of importance in MY 2001/2002					
Source: Data from the German Federal Office of Statistics, Wiesbaden					

Table 6: Citrus Exports from Mediterranean Countries, in 1,000 metric tons

Citrus Exports of Mediterranean Countries, in 1,000 metric tons ranked by volume of 2002/2003						
	1998/99	1999/2000	2000/01	2001/02	2002/03*	change
Oranges	2,462	2,640	2,427	2,671	2,808	+ 5
Spain	1,214	1,430	1,187	1,449	1,471	+ 2
Egypt	211	211	207	284	313	+ 10
Morocco	361	326	257	240	294	+ 22
Greece	260	268	355	256	267	+ 4
Turkey	102	86	121	187	200	+ 7
Italy	75	123	125	128	106	- 17
Other	239	196	175	127	157	+ 24
Crossbreeds	1,579	1,880	1,623	1,800	1,926	+ 7
Spain	1,102	1,317	1,143	1,185	1,310	+ 11
Morocco	223	271	136	190	232	+ 22
Turkey	137	123	160	245	200	- 18
Israel	30	35	29	25	35	+ 37
Other	87	134	155	155	149	- 4
Lemons	665	734	725	814	755	- 7
Spain	451	455	505	482	500	+ 4
Turkey	154	195	135	282	200	+ 29
Italy	11	26	24	19	19	+ 2
Other	49	58	61	31	36	+ 16
Grapefruits	243	254	234	236	246	+ 5
Turkey	63	85	83	112	100	- 11
Israel	123	115	94	69	91	+ 33
Cyprus	33	23	27	25	25	+ 2
Other	24	31	30	30	30	+ 0
All Citrus	4,954	5,512	5,014	5,526	5,740	+ 4
Source: Central Market and Price Reporting Agency, Bonn (ZMP)						
*Forecast						

Table 7: Per Capita Consumption of Fruit Juices and Nectars 1995-2001 (in liters)

	1995	1996	1997	1998	1999	2000	2001
Apple Juice	11.79	12.15	12.17	11.64	12	12.2	11.98
Orange Juice	9.83	10.25	10.17	10.03	9.51	9.53	9.51
Citrus Nectar	8.57	8.3	8.28	8.3	7.81	7.75	7.65
Grape Juice	1.19	1.21	1.3	1.3	1.32	1.32	1.32
Vegetable Juice	0.86	0.87	0.87	0.96	0.96	0.96	0.97
Grapefruit Juice	0.33	0.33	0.36	0.38	0.38	0.39	0.37
Pear Juice	0.13	0.15	0.17	0.17	0.18	0.18	0.19
Other Juice/Nectar	8.02	7.96	7.89	8.19	8.26	8.31	8.27
Total	40.72	41.21	41.21	40.97	40.42	40.64	40.26

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2001, page 42.